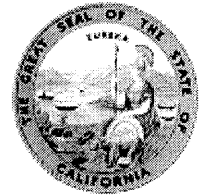




DIANA M. BONTÁ, R.N., Dr. P.H.  
Director

State of California—Health and Human Services Agency  
**Department of Health Services**



GRAY DAVIS  
Governor

February 6, 2003

Dear Interested Parties:

**ASSISTED LIVING WAIVER PILOT PROJECT REQUEST FOR APPLICATION  
# 02-25852 ADDENDUM 2**

Enclosed you will find Addendum 2, incorporating changes to RFA # 02-25852. Within the text of the document, additions are highlighted with underlines, deletions are highlighted with strikeouts, and all changes are identified with lines on the side margins.

Any changes made to the RFA are published as additional or replacement pages to the RFA. Since the RFA is available in both single-sided (on the Internet) and double sided (hardcopy from the Office of Medi-Cal Procurement) versions, the instructions for updating both formats are included in this letter. The replacement pages enclosed are for the double sided, hardcopy version.

In order to configure the RFA so that it accurately reflects the current requirements and considerations, add the new pages or remove the existing pages and insert the appropriate replacement page as indicated in the following table:

**HARDCOPY VERSION**

REMOVE EXISTING PAGES	ADD NEW/REPLACEMENT PAGES
RFA Section L, Pages 23 and 24	RFA Section L, Pages 23 and 24
Appendix 1, Pages 3 and 4	Appendix 1, Pages 3 and 4
Appendix 4, Pages 1 and 2	Appendix 4, Pages 1 and 2

In order to configure the Internet version of this RFA (single-sided) so that it accurately reflects current requirements and considerations, remove existing pages and insert the appropriate substituted page as indicated in the following table.



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[www.consumerenergycenter.org/flex/index.html](http://www.consumerenergycenter.org/flex/index.html)

ONLINE VERSION

REMOVE EXISTING PAGES	ADD NEW/REPLACEMENT PAGES
Section L, Page 24	Section L, Page 24
Appendix 1, Page 3	Appendix 1, Page 3
Appendix 1, page 4	Appendix 1, page 4
Appendix 4, Page 1	Appendix 4, Page 1
Appendix 4, Page 2	Appendix 4, Page 2

Proposers have five working days from the issue of this transmittal to the postmark date of the bidders' response to submit any objections to this Addendum.

If you have any questions, please contact my lead analyst on this project, Lisa Kale, at (916) 323-7406.

Sincerely,

*O/s by Donna Martinez*

Donna Martinez, Chief  
Office of Medi-Cal Procurement

Enclosure

The evaluators will individually and/or as a team review, evaluate and numerically score each application based on the application's adequacy, thoroughness, and the degree to which it complies with the RFA requirements.

Evaluators will use the scoring tool in Appendix 1 to score the applications submitted by each applicant. Refer To Appendix 1 for the details of the point value for each specific section.

Stage 2 – Narrative Application (100 points possible)

<b>Executive Summary Rating Factors (Not to exceed 3 pages)</b>	<b>Points Possible</b>	<b>Points Earned</b>
To what extent did the application express an understanding of DHS' needs and the importance of this project?	2	
To what extent did the application demonstrate the tangible results that it expects to achieve?	2	
To what extent did the application express a sincere commitment to perform this work in an efficient and timely manner?	2	
To what extent did the application demonstrate that it can effectively integrate the project into its' current obligations and existing workload?	2	
To what extent did the application adequately explain why it should be chosen to undertake this project at this time?	2	
<b>Subtotal of Points Earned</b>	<b>10</b>	
<b>Agency Capability</b>	<b>Points Possible</b>	<b>Points Earned</b>
To what extent are the goals of the firm and those of any subcontractor relevant or complementary to this project?	3	
From the description in the application, to what extent does the applicant (including any subcontractor) possess sufficient experience with:		
<ul style="list-style-type: none"> <li>Developing and managing state-level pilot project(s) in California or in other states, which focus on long-term health care and/or publicly funded housing for senior and disabled persons.</li> </ul>	3	
<ul style="list-style-type: none"> <li>Researching and/or developing programs and benefits which meet Medicaid and/or Medicare requirements.</li> </ul>	3	
<ul style="list-style-type: none"> <li>Establishing and maintaining contracts and/or agreements with local and State governments.</li> </ul>	3	
<ul style="list-style-type: none"> <li>Managing project(s) that utilize multiple professionals, such as administrative staff, clinical staff/consultants, auditors, information technology staff, public relations developers, researchers and others.</li> </ul>	3	

<ul style="list-style-type: none"> <li>Working with assisted living facilities and publicly funded health care and/or housing provider agencies in a collaborative manner.</li> </ul>	3	
<ul style="list-style-type: none"> <li>Convening stakeholder forums and workgroups in a variety of cultural and/or socio-economic settings.</li> </ul>	3	
<ul style="list-style-type: none"> <li>Developing and/or implementing quality assurance and improvement protocols in the health care arena; including consumer quality initiatives.</li> </ul>	3	
<ul style="list-style-type: none"> <li>Working with other States or federal agencies on reimbursement methodologies for assisted living under Medicaid.</li> </ul>	3	
Based on a review of the applicant's prior accounts or work projects in the past 3 years, identify previous consultative activities that were similar in nature or closely related to the RFA scope of work. Include the work of any subcontractor, if applicable.	3	
To what extent did the applicant demonstrate experience establishing and maintaining effective working relationships with government entities and local community based programs? Include the experience of any subcontractor, if applicable.	3	
To what extent did the applicant's prior clients as a whole, confirm their satisfaction with the applicant's past work and ability to deliver timely and effective services and deliverables? <i>Point description 0-3 identified for the above questions does not apply to this question. See Appendix 4 for reference check questions and description of points.</i>	3	
<b>Subtotal of Points Earned</b>	<b>36</b>	
<b>Work Plan</b>	<b>Points Possible</b>	<b>Points Earned</b>
To what extent does the applicant's Work Plan describe in detail the specific activities for each of the eight tasks below? Are each of the required deliverables adequately addressed for each task? (3 points max for each task.)		
<ul style="list-style-type: none"> <li>Develop the federal waiver application.</li> </ul>	3	
<ul style="list-style-type: none"> <li>Develop and finalize the assisted living provider reimbursement methodology and provider payment system.</li> </ul>	3	
<ul style="list-style-type: none"> <li>Design and plan the Assisted Living Waiver Pilot Project, conduct site and provider selection.</li> </ul>	3	
<ul style="list-style-type: none"> <li>Develop and present training sessions and materials for the Assisted Living Waiver Pilot Project providers and staff.</li> </ul>	3	

Based on a review of the applicant's prior accounts or work projects in the past 3 years, identify previous consultative activities that were similar in nature or closely related to the RFA scope of work. Include the work of any subcontractor .	3	
To what extent did the applicant demonstrate experience establishing and maintaining effective working relationships with government entities and local community based programs? Include experience of any subcontractor.	3	
To what extent did the applicant's prior clients as a whole, confirm their satisfaction with the applicant's past work and ability to deliver timely and effective services and deliverables? <i>Point description 0-3 identified for the above questions does not apply to this question. See Appendix 4 for reference check questions and description of points.</i>	3	
<b>Subtotal of Points Earned</b>	<b>36</b>	

Work Plan	Points Possible	Points Earned
<b>Instructions to Evaluators:</b> 0=Applicant restates or paraphrases information in the RFA 1=Applicant restates some information in the RFA, adds some additional language but does not adequately address the question. 2=Applicant adequately addresses the question. 3=Applicant more than adequately addresses the question.		
To what extent does the applicant's Work Plan describe in detail the specific activities for each of the eight tasks? Are all the required deliverables for each task adequately addressed?		
<ul style="list-style-type: none"> <li>Develop the federal waiver application.</li> </ul>	3	
<ul style="list-style-type: none"> <li>Develop and finalize the assisted living provider reimbursement methodology and provider payment system?</li> </ul>	3	
<ul style="list-style-type: none"> <li>Design and plan ALWPP, conduct site and provider selection?</li> </ul>	3	
<ul style="list-style-type: none"> <li>Develop and present training sessions and materials for ALWPP providers and staff?</li> </ul>	3	
<ul style="list-style-type: none"> <li>Develop and publish ALWPP participant enrollment information?</li> </ul>	3	
<ul style="list-style-type: none"> <li>ALWPPP implementation?</li> </ul>	3	
<ul style="list-style-type: none"> <li><u>Design and implement a quality assurance and improvement program.</u></li> </ul>	<u>3</u>	

• Contribute to an ALWPP evaluation report?	3	
To what extent are the applicant's overall approaches and/or methods comprehensive and/or technically sound for each of the eight tasks?	3	
To what extent did the applicant offer a rational basis for choosing its particular approaches and methods (i.e., proven success or past effectiveness)?	3	
To what extent are the proposed procedures, methods and approaches appropriate and reasonable (i.e., if implemented, are they likely to produce the desired results)?	3	
To what extent will the applicant perform the tasks/activities and functions in a logical order?	3	
To what extent are the proposed performance timelines realistic and achievable?	3	
To what extent does the applicant describe how it will propose strategies for DHS consideration and approval.	3	
<b>Subtotal of Points Earned</b>	<b>42</b>	

<b>Management Plan</b>	<b>Points Possible</b>	<b>Points Earned</b>
<b><i>Instructions to Evaluators:</i></b> <i>0=Applicant restates or paraphrases information in the RFA</i> <i>1=Applicant restates some information in the RFA, adds some additional language but does not adequately address the question.</i> <i>2=Applicant adequately addresses the question.</i> <i>3=Applicant more than adequately addresses the question.</i>		
To what extent has the applicant demonstrated its capability to effectively coordinate, manage and monitor the efforts of assigned staff including subcontractors and consultants, to ensure that work is effectively completed and timely?	3	
Upon reviewing the applicant's organization chart in the Appendix Section, to what extent is the applicant's organizational structure sound with distinct lines of authority and reporting relationships between management and all staff including subcontractors and consultants?	3	
To what extent does the applicant describe an organization that can provide project services under the contract such as clinical, research, actuary, accounting, information management, administrative, policy experts, etc?	3	
To what extent does the applicant describe fiscal accounting processes and budgetary controls that will adequately manage contract funds?	3	
<b>Subtotal of Points Earned</b>	<b>12</b>	
<b>SUBTOTAL NARRATIVE APPLICATION/STAGE 2</b>	<b>100</b>	

**Applicant Reference Check Questions**  
**Assisted Living Waiver Pilot Project**  
**3 Points Total Possible under Agency Capability section**  
**Subtotal Points: \_\_\_\_\_**

<b>Applicant ID</b>		
<b>Reference Name</b>		
<b>Reference Contact Person</b>		
<b>Reference Contact Telephone Number</b>		
<b>1.</b>	Describe the nature of the contract work done for your State and/or your organization.	
	What were the timeframes required for this contracted work?	
	Was the work always or most always done according to these timeframes?	
	If not, was it due to the contractor or extenuating circumstances?	
	How frequently were the deadlines missed?	
<b>2.</b>	Was the contractor's work for a Medicaid Single State Agency?	
	If yes, did the contractor work within the State's approval process? Please explain.	
<b>3.</b>	Did the work involve developing policy for publicly funded health care?	
	If yes, was the work grounded in sound research of State and federal statute and regulations?	

	If yes, did work products require minimum editorial work prior to State approval?	
4.	Did the work involve rate-setting and/or financing methodologies?	
	If yes, were the work products based in sound fiscal research and practices?	
5.	Did the work involve collaboration with public stakeholders?	
	If yes, were the collaboration efforts successful?	
6.	With respect to record keeping, did the contractor meet report deadlines?	
	Were reports complete and meaningful?	
	Were claims for reimbursement timely and complete?	
7.	Have there been any audits of work performed by this contractor?	
	If yes, is a copy available to us?	
8.	Would your organization contract with this organization or individual again?	
	If yes, can you name the top two reasons?	
	If no, why not?	
9.	With regard to your experience with this contractor, what was the contractor's greatest strength?	
10.	With regard to your experience with this contractor, what was the contractor's greatest challenge?	
DHS Reference Check Evaluator ID:		
Telephone Number:		

***Instructions to Evaluators:***

0= Respondent expresses overall concern/dissatisfaction with applicant.

1= Respondent expresses overall limited satisfaction with applicant.

2= Respondent expresses overall adequate satisfaction with applicant.

3= Respondent expresses overall more than adequate satisfaction with applicant.